Study on Operational Efficiencies for Delivering Administrative and Other Support Services

Kickoff Meeting and Discussion

January 29, 2013
Welcome, Introductions and Opening Comments

Our Understanding of Morgan State University Needs
  • Project Objectives
  • Key Initiatives

Attain’s Approach to the Scope of Work
  • Project Lifecycle
  • Project Cadence
  • Project Timing

Attain’s Relevant Higher Education Experience

Discussion and Q&A

Closing and Next Steps
Welcome, Introductions and Opening Comments
<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Experience</th>
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</table>
| Greg Baroni        | Client Partner and IT Assessment Lead                               | - 30+ years serving the Higher Education Community  
- Former Corporate Senior Vice President and Division President, Federal/Public Sector, Unisys Corporation  
- Former Sr. Vice President of KPMG Consulting’s Higher Education and Health Care Business |
| Wally Davis        | Engagement Partner/Overall Project Executive                        | - 26 years serving the Higher Education Community  
- Former University Executive  
- One of the nation’s leading experts in grants management |
| Robert Cohen       | Senior Manager/Overall Project Manager and Finance and Sponsored Research Lead | - 25+ years serving the Higher Education and Academic Medical Center Community  
- Former University Executive in a Major Academic Medical University |
| John Deeley        | Senior Manager/Academic Affairs and Institutional Advancement Lead   | - 35+ years serving the Higher Education and Academic Medical Center Community  
- Former University Senior Executive |
| Chuck Wolfkill     | Manager/Student Affairs Lead                                        | - 30 years serving the Higher Education Community in the Student Services arena  
- Former University Executive |
| John McGuire       | Technical Specialist/Facilities Operations Lead                     | - 35 years serving the Higher Education Community in the Facilities Management arena  
- Former President and CEO of Savage Engineering |
## Attain’s Subcontractor (Entap) Introductions

<table>
<thead>
<tr>
<th>Name</th>
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<th>Experience</th>
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<tbody>
<tr>
<td><strong>Joey Harpst</strong></td>
<td>Vice President/Human Resources Lead</td>
<td>Nearly 20 years of proven leadership, including all facets of Program/Project Management</td>
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</table>
| **Alicia Kinsey**  | Senior Consultant/Procurement Lead         | 15+ years of senior financial systems experience  
|                    |                                            | Significant experience with Peoplesoft                                        |
| **Bethany Spotts** | Senior Consultant/Auxiliary Business Lead | 20+ years leadership experience serving the Higher Education Community  
|                    |                                            | Former University Executive in a Major University and a University Medical Center |
Our Understanding Morgan State University’s Needs
Our Understanding Morgan State University’s Needs

[Project Objectives]

Attain will assist in designing a more cost effective organizational structure for administering the University and delivering essential support services in the most efficient and effective manner. This includes the following:

- Identify services unnecessarily expensive or under-resourced
- Identify duplications in functions across campus
- Identify cost effective organizational design changes
- Identify opportunities for reducing the number of organizational layers
- Identify functions and processes that do not conform to best practices and can be delivered more efficiently and effectively
Our Understanding Morgan State University’s Needs

[Key Initiatives]

➢ Information Technology and Operations
➢ Student Affairs Administration
➢ Physical Plant, Operations & Maintenance, and Design Construction
➢ Academic and Department Administration
➢ Institutional Advancement Administration
➢ Other Administrative Activities to include:
  ➢ Finance
  ➢ Procurement and Property Control
  ➢ Human Resources
  ➢ Sponsored Programs and Research
  ➢ Business and Auxiliary Services
Attain’s Approach to the Scope of Work
STEP 1 – Kickoff
- Introduce team members, timeline and plan of initial actions

STEP 2 – Perform Field Work – “Divide and Conquer”
- Gain an understanding of MSU’s current operating environment and the procedures employed by MSU in meeting its commitments to each constituent group
  - Gather information through primary and secondary sources, i.e., interviews and data, and perform initial assessment
  - Interview senior leaders, process owners and key constituents
  - Review of organizational structure and departments through a review of various peer analyses and benchmarking
    - Determine if current departmental structures represent optimum size/appropriate critical mass – gaps, overlaps, redundancies and misalignments
    - Determine whether technology can be used more efficiently
  - Stress test MSU’s financial performance over the past five years using Attain’s proprietary tools generated from a publication it contributed to authoring entitled “Strategic Financial Analysis for Higher Education”

STEP 3 – Deliverables
- Provide Status Reports
- Final Report
  - Balance to a view of what is reasonable and achievable
Attain’s Approach – Project Lifecycle

Field Work Performed

1. Project Kick Off
   - Introduce Team Members
   - Review Initiative Areas and Timeline

2. Review Data
   - Data Request
   - Data Gathering
   - Organizational Charts
   - Demographic Data
   - Financial Data
   - Performance Metrics

3. Perform Interviews
   - Senior Leadership
   - Process Owners
   - Key Constituents

4. Benchmarking
   - Peer Analysis and Benchmarking
   - Apply Industry Best Practices
   - Apply Attain Knowledge

5. Final Report
   - Status Reports
   - Final Report
   - Findings and Recommendations

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Project Cadence

Project Status
- Frequency of Meetings
- Format of Reporting
- Risk/Issue Management

Project Deliverables
- Presentation of our high-level assessment which will contain our findings and recommendations
- Presentations to the MSU staff and leadership regarding the findings and recommendations

Client Obligations
- While Attain is on-site, MSU will provide Attain’s resources with a dedicated work area that is nearby an electrical outlet and with Internet access.
- MSU will expedite information requests – delays in providing information may impact the schedule and fees.
- MSU will provide the necessary and experienced resources to be available upon request to answer Attain questions.
- MSU will provide access to the appropriate executive, faculty and information technology personnel in the departments.
## Calendar 2013

<table>
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<tr>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
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<tbody>
<tr>
<td>29 JAN 2013</td>
<td>PROJECT KICK-OFF</td>
<td>REVIEW DATA</td>
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<td>PERFORM INTERVIEWS</td>
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Attain’s Relevant Higher Education Experience
Through our management consulting and technology solutions, we are able to provide our clients with field-trained consultants who have in-depth, hands-on knowledge and understanding of the business issues inherent in the higher education and academic medical center services industries.

Strong higher education resources

- 50 dedicated higher education professionals
- Expert consultants specializing in cost reimbursement and regulatory compliance
- ERP implementation and systems integrations experience; provide complete end-to-end solutions

Comprehensive higher education solutions

- Leadership in Grants Accounting and operations improvement services
- Industry leading Strategic Financial Analysis, measuring & reporting financial risks
- Industry leading High Performance Computing support

Deep strategic and process solutions

- Combine analytical, financial, and managerial skills to create long-term results as well as rapid response solutions
- Well-versed in business metrics and performance monitoring
- Ability to facilitate the redesign of business processes
- Innovators in working with regulators

Clients that are industry leaders

- Advise Harvard University, Yale University, The Johns Hopkins University, Columbia University, Washington University, University of Pennsylvania, and the University of Washington
- Serve 2/3rds of the top 100 research universities
Committed to serving the Higher Education, Academic Medical Centers, and Not For Profit market for over 40 years

Specialize in getting **breakthrough results** for our Clients

**Unparalleled experience** with a deep bench of F&A recognized experts

Developed strategic relationships which enable us to work effectively with the Government

Our client list includes the following institutions:

<table>
<thead>
<tr>
<th>Harvard University</th>
<th>Emory University</th>
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<tr>
<td>Boston Children’s Hospital</td>
<td>University of Miami</td>
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<tr>
<td>Yale University</td>
<td>University of Alabama</td>
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<tr>
<td>Columbia University</td>
<td>University of Alabama Birmingham</td>
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<tr>
<td>New York University &amp; SOM</td>
<td>University of Missouri</td>
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<tr>
<td>Rutgers University</td>
<td>Washington University</td>
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<tr>
<td>University of Rochester</td>
<td>Mayo Clinic</td>
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<tr>
<td>Dana Farber Cancer Institute</td>
<td>Weill Medical College of Cornell University</td>
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<tr>
<td>Memorial Sloan Kettering Cancer Center</td>
<td>Tufts University</td>
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<tr>
<td>University of Pennsylvania</td>
<td>Albert Einstein College of Medicine</td>
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<tr>
<td>Johns Hopkins University</td>
<td>University of Arizona</td>
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<tr>
<td>Virginia Commonwealth University</td>
<td>University of California San Francisco</td>
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<tr>
<td>University of Virginia</td>
<td>University of Washington</td>
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Our strategy is simple: to partner with our Clients as they seek to recover the costs of their investments in sponsored programs.
Discussion and Q&A
Information Requests

- Organizational structure for each of the organizational units in the study
- The “As-Is” processes and procedures for each study area
- Performance metrics
- Five (5) years of the most recent financial reports
- Budgets for each organizational unit in the study
- Key constituents for interviews
  - Senior Leaders
  - Process Owners
  - User Community
Closing and Next Steps
Proven Performance.  
Forward Thinking.

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